

# Unit 20: Sales Planning and Operations

Unit code: Y/601/1261

QCF level: 5

Credit value: 15 credits

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- Aim

The aim of this unit is to provide learners with an understanding of sales planning, sales management, and the selling process, which can be applied in different markets and environments.

- Unit abstract

Selling is a key part of any successful business, and most people will find that they need to use sales skills at some point in their working life – if only to persuade or win an argument. For anyone who is interested in sales as a professional career it pays to understand the basics of selling, to practice, and plan. This unit will introduce learners to the theory of selling and sales planning, and give them the opportunity to put their personal selling skills into practice.

The unit starts with an overview of how personal selling fits within the overall marketing strategy for a business. Learners will be taken through the main stages of the selling process, and be expected to put them to use. Once they are confident about the selling process, learners will investigate the role and objectives of sales management. This is knowledge that can be applied to a wide range of organisations.

Finally, learners will be able to start planning sales activity for a product or service of their own choice – this is another valuable skill that is transferable to many different situations learners may find themselves in as they move into employment or higher education.

- Learning outcomes

**On successful completion of this unit a learner will:**

- 1 Understand the role of personal selling within the overall marketing strategy
- 2 Be able to apply the principles of the selling process to a product or service
- 3 Understand the role and objectives of sales management
- 4 Be able to plan sales activity for a product or service.

# Unit content

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## 1 Understand the role of personal selling within the overall marketing strategy

*Promotion mix:* personal and impersonal communication; objectives of promotional activity; push-pull strategies; integrating sales with other promotional activities; evaluating promotion; allocation of promotion budget

*Understanding buyer behaviour:* consumer and organisational purchase decision-making processes; influences on consumer purchase behaviour (personal, psychological, social); influences on organisational buyer behaviour (environmental, organisational, interpersonal, individual); purchase occasion; buying interests and motives; buyer moods; level of involvement; importance and structure of the DMU (Decision Making Unit); finding the decision-taker; distinction between customers and users

*Role of the sales team:* definition and role of personal selling; types of selling; characteristics for personal selling; product and competitor knowledge; sales team responsibilities (information gathering, customer and competitor intelligence, building customer databases, prospecting and pioneering, stock allocation, maintaining and updating sales reports and records, liaison with sales office); sales team communications; the role of ICT in improving sales team communications

## 2 Be able to apply the principles of the selling process to a product or service

*Principles:* customer-oriented approach; objective setting; preparation and rehearsal; opening remarks; techniques and personal presentation; need for identification and stimulation; presentation; product demonstration and use of visual aids; handling and pre-empting objections; techniques and proposals for negotiation; buying signals; closing techniques; post sale follow-up; record keeping; customer relationship marketing (CRM)

## 3 Understand the role and objectives of sales management

*Sales strategy:* setting sales objectives; relationship of sales, marketing and corporate objectives; importance of selling in the marketing plan; use of marketing information for planning and decision making (sources and collection methods); role of sales forecasts in planning; quantitative and qualitative sales forecasting techniques; strategies for selling

*Recruitment and selection:* importance of selection; preparing job descriptions and person specifications; sources of recruitment; interview preparation and techniques; selection and appointment

*Motivation, remuneration and training:* motivation theory and practice; team building; target setting; financial incentives; non-financial incentives; salary and commission-based remuneration; induction training; training on specific products; ongoing training and continuous professional development (CPD); training methods; preparation of training programmes; the sales manual

*Organisation and structure:* organisation of sales activities (by product, by customer, by customer type; by area); estimation and targeting of call frequency; territory design; journey planning; allocation of workload; team building; creating and maintaining effective working relationships; sales meetings; sales conferences

*Controlling sales output:* purpose and role of the sales budget; performance standards: performance against targets (financial, volume, call-rate, conversion, pioneering); appraisals; self-development plans; customer care

*Database management:* importance of database building; sources of information; updating the database; use of database to generate incremental business and stimulate repeat purchase; use of database control mechanisms; importance of ICT methods in database management; security of data; Data Protection Act

#### **4 Be able to plan sales activity for a product or service**

*Sales settings:* sales channels (retailers, wholesalers, distributors, agents multi-channel and online retailers); importance of market segmentation: business-to-business (BTB) selling; industrial selling; selling to public authorities; selling for resale; telesales; selling services; pioneering; systems selling; selling to project teams or groups

*International selling:* role of agents and distributors; sources, selection and appointment of agents/distributors; agency contracts; training and motivating agents/distributors; use of expatriate versus local sales personnel; role, duties and characteristics of the export sales team; coping in different cultural environments; the role of ICT in communicating with an international sales team

*Exhibitions and trade fairs:* role, types and locations of trade fairs and exhibitions; how trade fairs and exhibitions fit in with corporate strategy and objectives; setting objectives for participation in an exhibition; audience profile and measurement; qualification and follow-up of exhibition leads; evaluation of exhibition attendance; setting budgets; financial assistance for exhibition attendance; principles of stand design

## Learning outcomes and assessment criteria

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<b>Learning outcomes</b>  <b>On successful completion of this unit a learner will:</b>	<b>Assessment criteria for pass</b>  <b>The learner can:</b>
LO1 Understand the role of personal selling within the overall marketing strategy	1.1 explain how personal selling supports the promotion mix 1.2 compare buyer behaviour and the decision making process in different situations 1.3 analyse the role of sales teams within marketing strategy
LO2 Be able to apply the principles of the selling process to a product or service	2.1 prepare a sales presentation for a product or service 2.2 carry out sales presentations for a product or service
LO3 Understand the role and objectives of sales management	3.1 explain how sales strategies are developed in line with corporate objectives 3.2 explain the importance of recruitment and selection procedures 3.3 evaluate the role of motivation, remuneration and training in sales management 3.4 explain how sales management organise sales activity and control sales output 3.5 explain the use of databases in effective sales management
LO4 Be able to plan sales activity for a product or service	4.1 develop a sales plan for a product or service 4.2 investigate opportunities for selling internationally 4.3 investigate opportunities for using exhibitions or trade fairs.

# Guidance

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## Links

This unit links to other marketing units within the pathway – *Unit 17: Marketing Intelligence, Unit 18: Advertising and Promotion in Business* and *Unit 19: Marketing Planning*.

The unit is also linked with *Unit 4: Marketing Principles* and *Unit 6: Business Decision Making*.

## Essential requirements

Learners must have access to a suitable business teaching environment with access to the internet in order to carry out research. They also require access to a range of organisations that have active sales teams currently engaged in personal selling.

Tutors could consider building a bank of contacts and resource materials to ensure there is a sufficient supply of relevant information across a range of business types and sectors.

## Employer engagement and vocational contexts

Learners can generate evidence from a work placement or work experience. Some learners may have access to selling opportunities from family owned and run businesses.

There are numerous textbooks covering sales planning and operations. It is important that learners are directed to a balance of comprehensive theoretical texts and the more readable 'how to' books which provide an excellent source of practical exercises.

Marketing and sales journals are a good topical source for personal selling and sales management activities. A number of videos have been produced demonstrating good (and bad) sales techniques. Many of these form part of sales training programmes which can be purchased. Throughout the course of an academic year, topical programmes often appear on television for example, *Dragons' Den*.

Centres should develop links with local businesses such as businesses that have sales teams as part of their marketing strategy. Many businesses and chambers of commerce want to promote local business and are often willing to provide work placements, visit opportunities, information about businesses and the local business context and guest speakers. Local Business Link organisations are another good source for employer engagement as they are in contact with a range of different businesses in different industries.